

Learning Team Assignment Session 3

This exercise provides a useful way to engage several important job aids introduced in Session 3. This is a 2-part case study. Read the case study and complete both sections.

Case Study

You are the Client Lead of a large project, launching next month. You are concerned because the client's vision is complex, keeps changing, and looks like it will likely involve a lot of time from each project team member. The client, Vicki, is willing to invest additional time and funds. You are concerned when you learn that the Vicki has asked her CEO to monitor and join project meetings, and relieved when you hear that while he is excited about the project and a bit of a worrier, that he declined due to travel and other commitments.

Vicki has asked her assistant, Becka, to step in when she cannot make meetings. Becka has a storehouse of knowledge and experience and seems willing to support the goals of the project. One more person from the client side will be joining, an independent consultant who has been with the client for many years.

The IG team members include:

- Jill, Executive Director of Marketing
- Marcelle, Sales Lead
- Pat, Education Lead
- Lisa, Accounting Executive Director

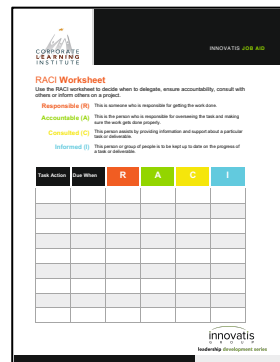
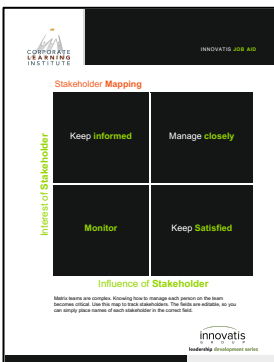
The client has already signed a contingency agreement to allow extra time and resources for the project. Pat, Education Lead, will be needed more as the project develops and the logistics are resolved. Finally, Lisa as Accounting Executive Director will be on stand-by as the budget from the client side has been established. However, there will be expense concerns looming if the project mushrooms.

Directions

1. Read the case study. There are two parts to this case study, so please use your time wisely.

2. **Part 1:** Use the following job aids to complete this case study:

- Use the Stakeholder Map to envision how to engage each stakeholder on the client side.
- Use the RACI Worksheet to envision how to engage each staff member on your IG team.
- Work at a high level and work as a brainstorming team to review how you would use each job aid. You may not get to complete all documents, and the point is to become familiar and confident in their use.



- Once you have completed Part 1, continue to Part 2, below.

Part 2: As the project meetings continue, you have an important decision to make. You would like to build a consensus decision, which you know will more fully engage your team members and ensure ownership and collaboration.

The client wants to expand the project to include their international offices, while keeping the same project timeline.

Choose from the following tools to use to ensure that a consensus decision is made about this new client request:

1. The 1-10 Check-in (Where are you on a 1-10 with this decision?)
 2. The Fist to Five (How supportive are you of this new client ask on a from 1-5 (5 high?)
 3. Speed Consensus Exercise (How might we proceed if we agree to the new client ask?)
- Which tool would you use and why?

